

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: [REDACTED]

Position: Financial Management Specialist, GS-0501-12

Organization: BR3F

Main Appraiser: [REDACTED]

Date Developed: [REDACTED]

Date Issued: [REDACTED]

Critical Element: Systems Implementation / Support / Coordination(30%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Serves as the regional lead for financial accounting systems (e.g., Pegasys, E2, FMIS, Vitap, BTS, FedDesk, E2 and PTW), coordinates with leads on other systems (e.g., IRIS, RETA). Identifies needs and provides general training and administration on (e	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Serves as the regional lead for financial accounting systems (e.g., Pegasys, E2, FMIS, VITAP and Business Objects) and coordinates with leads on other systems (e.g., IRIS, RETA). Identifies needs and provides general training and administration (e.g., Pegasys, E2, Documentum, business objectives). Uses judgment to determine when to escalate concerns.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Financial Analysis and Reporting(20%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Consistently and timely responds to financial management inquiries by researching, analyzing, reporting and following through. Raises concerns	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Timely responds to financial management inquiries by researching, analyzing, reporting, trending and/or following through. Analysis and reporting are clear, complete and accurate. Any follow up issues are timely addressed. Raises concerns when appropriate.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Associate Performance Planning Worksheet - AFGE Bargaining Unit Employees

Employee Name: (b) (6)

Position: Financial Management Specialist, GS-0501-12

Organization: BR3F

Main Appraiser: (b) (6)

Date Developed: (b) (6)

Date Issued: (b) (6)

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
		when appropriate.						

Critical Element: Internal and External Customer Relationship Management(25%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/independent reviewers), consistently and timely provides services and products to them, anticipates their needs	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Builds rapport and working relationship with colleagues (within division) and customers (within region, CO, Finance Center and contractors/independent reviewers), timely provides services and products to them, anticipates their needs and ensures coverage and continuity of work.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

Critical Element: Internal Process Improvements and Special Projects(15%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Provides recommendations for improvements and identifies best practices	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Provides recommendations for improvements and identifies best practices and lessons learned. Timely attends relevant meetings and conference calls. Demonstrates ability to problem solve and complete	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center

This worksheet is only intended to assist you in completing the OFFICIAL Associate Performance Plan and Appraisal documents as identified by GSA Order **CPO P 9430.1**

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Employee Name: (b) (6)

Position: Financial Management Specialist, GS-0501-12

Organization: BR3F

Main Appraiser: (b) (6)

Date Developed: 1 (b) (6)

Date Issued: (b) (6)

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
		and lessons learned. Consistently and timely attends relevant meetings and conference calls. Demonstrates ability to problem solve and complete other projects timely.			other projects timely.			

Critical Element: Open Item Support(10%)

Description:

Derived From	General Measure	Specific Measure	Standards/Exception					Feedback Source For Monitoring
			Level 1	Level 2	Level3	Level4	Level5	
Position Description (PD), GSA goals, CFO/ARA/RA Performance Plans	Quality, Timeliness, Consistency	Supports coordination of regional open items to include monitoring of open items, timely responses to inquiries and necessary training. Uses judgment to determine when to escalate issues.	Does not meet performance expectations as defined in Level 3.	Partially meets performance expectations as defined in Level 3.	Supports coordination of regional open items to include monitoring of open items, timely responses to inquiries and necessary training. Uses judgment to determine when to escalate issues.	Meets and often exceeds performance expectations as defined in Level 3.	Meets and consistently exceeds performance expectations as defined in Level 3.	Supervisor, directors/ARA/RA, other managers, colleagues, customers, CO, Finance Center